

Appendix B

Complex Case Service Planning - Checklist

The following checklist is to be used as a guide in requesting assistance from the regional office or DHS Complex Case Planning Team regarding complex case issues.

County Level

- ___ County complex planning team meeting(s) held on _____.
- ___ Family and child/youth received contact information for family advocacy organizations available to them. Information provided includes _____.

Result of County Complex Planning Team Meeting:
(check any that apply)

- ___ Resources were discussed, and next steps cannot be identified
- ___ Services and/or placement options cannot be identified
- ___ The team, family, and child/youth cannot reach an agreement on services or placement options
- ___ Funding sources cannot be identified and/or resolved in a blended, braided or shared manner

If a county complex planning team meeting has been held with **all** agencies/individuals involved in the child/youth's case and one or more of the conditions above are keeping the case from being resolved, then an individual or county agency should contact the appropriate regional office for assistance.

County-State Joint Level

In order to refer a complex case for regional office assistance around funding and appropriate services/placement options, the county agency should include the following information:

- ___ If a county is requesting funding assistance, the county should provide a list of the current funding source(s), funding sources that have been explored, and the specific barriers(s) to obtaining funding from existing funding sources/systems.
- ___ If a county is requesting assistance locating appropriate community-based services that would allow a family and community-based placement (non-group setting), the county should include a list of the services or supports that it thinks would make a community or family based placement possible.
- ___ If a county is requesting assistance with locating appropriate community or congregate care services, the county should include a list of services/placements already explored and outcomes related to those service/placement referrals.

- ___ Joint county-state complex planning team meeting(s) held on _____.

State Level

If all other avenues have been explored, a referral can be made to the DHS Complex Case Planning Team via submission to the Complex Case Resource Acct (RA-PWCMPLEXCASEREFS@pa.gov). Only cases meeting one of the following criteria are appropriate for referral to the Complex Case Team:

- ___ The resolution involves a clinically appropriate solution that requires support from multiple program offices or agencies.
- ___ The funding solution comes from multiple sources; which may include external entities.
- ___ The case involves complexities that render them un-resolvable through the established county or regional offices processes.
- ___ The child/youth is currently in an inappropriate placement due to an inability to identify or implement the least restrictive treatment option.